

DOCUMENT:
Section:
REVISION DATE:
Prepared by:
APPROVED BY:

Document identification protocol

Objective: To ensure that all documents not electronically received are clearly identified so that information is correctly placed in the Medical/Dental Electronic Health Record.

Responsibility: Medical Records Staff, Medical/Dental Front Support Receptionists, Medical Assistants, Registered Dental Assistant, Dental Assistants, Billing Staff, CPSP Case Managers, Health Education Staff and Behavioral Health Staff.

Protocol: All documents that are not electronically transmitted into the patient's Medical/Dental Electronic Health Record must be identified so that proper scanning and indexing will be complete accurately.

All documents included in the patient paper record will be identified with patient information to ensure accuracy in the patient health record.

Handwritten identification of patient information will not be accepted as this has resulted in documents being placed incorrectly in a Patient Medical/Dental Electronic Health Record and Paper Health Record.

All documents should have a patient label clearly identifying the patient so that all documents are placed in the correct patient Medical/Dental Electronic or Paper health record.

The patient label generated from the Practice Management System contains the following required identifiers:

Patient Name

Patient Chart Number

Date of Birth

Gender

Date of Visit (if Required)

Financial Class

All patient labels will be placed on the document on either the upper right hand corner or lower right hand corner. If the document is more than one page each page will be required to have a label on it.

References:

Health Insurance Portability and Accountability Act (HIPAA) Privacy & Security Rule, 45 CFR 160-164.524

COIMA - California Confidentiality of Medical Information Act, California Civil Code Section 56 - 56.16